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**TO: Economic Support Supervisors
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W-2 Agencies**

**FROM: Amy Mendel-Clemens
Communications Section
Bureau of Health Care Eligibility**

BHCE/BWP OPERATIONS MEMO

No.: 03-30

Date: 04/21/2003

Non W-2 ☐ W-2 ☒ CC ☐

PRIORITY: HIGH

SUBJECT: CONFERENCE ON PERSONAL FINANCE

EFFECTIVE DATE: Immediately

PURPOSE

This memo provides information about a special conference on personal finance.

BACKGROUND

The Department of Workforce Development, the Department of Financial Institutions and Asset Builders of America have teamed up with other community businesses and social services agencies to offer the fourth annual "Money Conference: A Conference on Personal Finance".

The Conference is targeted toward low-income families and will offer education and training about credit with speakers from Consumer Credit Counseling Service, The Consumer Federation of America, Black Entertainment Television, the IRS Taxpayer Education Office, Junior Achievement and two young entrepreneurs whose message is to "Build Wealth—Not Debt". There will also be education and training about why money management is important and what programs and services are available to low-income families who want to start a savings/investing program.

The Money Conference also offers education and training for children and young adults ages 6 to 18. Children and young adults can learn what investment and financial education programs are available in the community.

Mike Behan, Economics Teacher of the Year winner will teach youth sessions on the economy entitled "You ARE the System" to help kids understand their place in this economy. In addition to the youth sessions, there will be the "Financial and Investment Challenge Bowl" and the

“Intelligent Arts Showcase—where local youth will display their talent using a “Financial” theme. There will also be investment education for intermediate investors.

POLICY

The conference cost is \$10 for adults and \$5 per child and includes a continental breakfast, lunch, program materials and door prizes. The Conference will be Saturday May 10th at the Italian Community Center, 631 East Chicago Street, Milwaukee Wisconsin and registration begins at 7:45 AM.

The Money Conference is an allowable W-2 education and training activity. W-2 agencies are asked to encourage W-2 participants and staff to attend this conference.

If the W-2 agency requires a participant to attend, the following must occur:

1. Necessary supportive services (transportation, child care, and payment for registration) need to be provided.
2. The employment plan should reflect the activity.
3. Hours must be considered in the 10-12 hours per week education and training limit.

Registration materials are available to W-2 agencies to distribute to their clients and staff; see the announcement (next page) for a resource.

W-2 supportive services should be used to pay registrations for W-2 clients and to provide transportation and child care.

CONTACTS

BHCE CARES Information & Problem Resolution Center

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Note: Email contacts are preferred. Thank you.